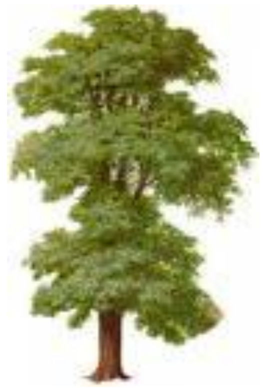


ELM Learning Admin Quick Guide

Self Service, Manager Self Service, Learning Administration

4/1/2010

Full Learning Administrator Training Guide available at: http://www.nd.gov/omb/docs/elm-training-guide-jan-2010.pdf

ELM access request form (Send to Darin Schorsch HRMS): http://www.nd.gov/eforms/Doc/sfn59210.pdf

Table of Contents

This document is meant to serve as a guide for most often asked questions.

1 Self Service Employee uses Self Service to enroll into a class.

Purpose: Employee self enrolls in a class.

Step	Action
1.	Begin by navigating to the **Search Catalog** page. Click the **ELM SS Search Catalog** link. ELM SS Search Catalog
2.	The **Search Catalog** page is used to search for learning activities, catalog items and programs.
3.	Click in the **Search the Catalog** field.
4.	Enter the desired information into the **Search Activities** field. Enter "**Back Safety**". **(Or the class that you are interested in)**
5.	Click the **Search Activities** button. Search Activities
6.	Notice all the activities entitled are returned.
7.	Click the **Back Safety (110RISK0023)** link. (**Or the class and date you are interested in.**)
8.	Click the **Enroll** button. Enroll
9.	Click the **Submit Enrollment** button. Submit Enrollment
10.	You have successfully enrolled in the activity: **Back Safety**.
11.	**Congratulations**! You should now be able to: - Navigate to the **Search Catalog** page. - Enroll in an activity. **End of Procedure.**

2 <u>Self Service</u> Register in a Program (Def. Driving, CPR) and enroll in a class.

Purpose: Employee self registers in Defensive Driving Certification, and enrolls in the class.

<u>NOTE: this is different than enrolling in a regular class.</u>

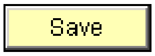
Step	Action
1.	Click the **ELM SS Search Catalog** link. You can search and enroll in a course or register for a program here. ELM SS Search Catalog
2.	Click the **Programs** link. Programs include: Certifications (with dates of expiration), and Curricula (no expiration). Programs
3.	Click the **Search Programs** button. Search Programs
4.	Click the **Register** link for the correct program ie. Defensive Driving. Register
5.	Click the **Submit Registration** button. This is the first step, you also need to **<u>enroll in a class</u>** for this certification. Submit Registration
6.	Click the **My Learning** link. Now go to My Learning to view the certification and **<u>enroll in a class date and time.</u>** My Learning
7.	Click the **Defensive Driving Certification** link.
8.	Click the scrollbar to navigate to the bottom of the page.
9.	Click the **View Enrollment Options** link. View Enrollment Options
10.	Click the **View Details** link. View Details

Step	Action
11.	Click the **Schedule** link. Schedule
12.	Click the **Details** link to see the facility and room. Details
13.	Click the **Return to Previous Page** link. Return to Previous Page
14.	Click the **Enroll** button. Enroll
15.	Click the **Submit Enrollment** button. Submit Enrollment
16.	Once your Supervisor approves the class you will receive an email enrollment confirmation, containing an outlook calendar appointment detailing the class information.
17.	Click the **Home** link. Home
18.	**End of Procedure.**

3 Self Service Adding Supplemental Learning

Step	Action
1.	Begin by navigating to the **Supplemental Learning** page. Click the **ELM SS Supplemental Learning** link. ELM SS Supplemental Learning
2.	**Note**: To enter education units for tracking purposes, the "**External Learning**" supplemental learning type must be selected from the drop-down list.
3.	Click the **Type** list.
4.	Click the **External Learning** list item. External Learning
5.	Click the **Continue** button. Continue
6.	Enter the desired information into the **Title** field. Enter "**How to Use Microsoft Office Suite**".
7.	Click in the **Description** field.
8.	Enter the desired information into the **Description** field. Enter "**How to use Microsoft Office Suite applications**".
9.	Click the **Status** list.
10.	Click the **Submit for Approval** list item. **Submit for Approval**
11.	Click in the **Start Date** field. 12/16/2009
12.	Press **[Delete]**.

Step	Action
13.	Enter the desired information into the **Start Date** field. Enter "**12/21/2009**".
14.	Click in the **End Date** field. 12/16/2009
15.	Press **[Delete]**.
16.	Enter the desired information into the **End Date** field. Enter a valid value e.g. "**12/21/2009**".
17.	Click in the **Location** field.
18.	Enter the desired information into the **Location** field. Enter "**Bismarck, ND**".
19.	If you have **Study Hours**, **Travel Hours**, or **Price** you can enter them.
20.	The **Education Units** field is used to enter the number of continuing education units that you want accredited to a learner on completion of this learning activity. **Note**: This value is for informational purposes only.
21.	Click in the **Education Units** field.
22.	Enter the desired information into the **Education Units** field. Enter "**6**".
23.	Click in the **Provided By** field.
24.	Enter the desired information into the **Provided By** field. Enter "**The Learning Corporation**".
25.	Click the **Ed. Unit Type Lookup** button.
26.	Select the "**MEU**" list item. (Select your correct unit). MEU
27.	You can enter in Estimated Travel/Hotel costs.

Step	Action
28.	You can also enter in Estimated Meal costs.
29.	Click the **Save** button. 
30.	The supplemental learning has been successfully added. When your Manager approve s this it will show as complete on you r **All Learning** page.
31.	**Congratulations**! You should now be able to: - Navigate to the **Supplemental Learning** page. - Add supplemental learning to a learners training plan. **End of Procedure.**

4 Manager Approving/Denying the Enrollment of Learners

A manager would usually get an email indicating “You have a pending approval”

Step	Action
1.	Click the scrollbar.
2.	Click the **ELM MSS Team Member** link. ELM MSS Team Member
3.	The **Team Members** page is used by managers to review a list of their team members, oversee team learning and approve or deny learning requests.
4.	Click the **Virginia Rivinius** option.
5.	Click the **Approve** button. Approve
6.	Notice Virginia Rivinius has been successfully enrolled in the activity: **Lincoln 101**.
7.	**Congratulations**! You should now be able to: - Navigate to the **Team Members** page. - Approve enrollment of learners. **End of Procedure.**

5 Learning Admin Enrolling (Many) Learners by Department, Learner Group or Business Unit into a class.

Step	Action
1.	Begin by navigating to the **Enroll Learners - Find Requesters** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft
3.	Click the **Enterprise Learning** link. Enterprise Learning
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning
5.	Click the **Learner Tasks** link. ▷ Learner Tasks
6.	Click the **Enroll Learners** link. – Enroll Learners
7.	For this example, search for the person requesting enrollment by entering criteria in the **Requester's Last Name** field.
8.	Click in the **Requester's Last Name** field.
9.	Enter the desired information into the **Requester's Last Name** field. Enter "**Holmes**".
10.	Click the **Search** button. Search
11.	Click the **Select** button next to the correct person. Select
12.	The **Enroll Learners - Search for Learning** page allows you to search for the requested activity or program by entering criteria in one or more of the search criteria fields.

Step	Action
13.	Click in the **Title** field.
14.	Enter the desired information into the **Title** field. Enter "**ADA**".
15.	Click the **Search** button. Search
16.	Click the **Enroll** button. Enroll
17.	You are now able to view details for the activity, **ADA**, that is offered on 12/08/2009 prior to selecting the learner you want to enroll.
18.	You can now determine how you want to populate the class, you can do it by each learner, by the Manager (= learners that report to the Manager), Learner group (ALL XXX Agency), Hire date, Business Unit, Job Code, Position, and multiples of those…ie. Business unit (11000), Organization type = (Department), Organization name (Fiscal)
19.	Click the **Business Unit** button and find your Business Unit.
20.	Click the **Organization Type** drop-down list and select **Department.**
21.	Click the **Department Name** button and find the department you want to enroll.
22.	Click the **Search** button. (you will now see a list of folks that are in the department) Search
23.	If the class required approval, you will see **Approve Enrollment Now**, if you check it, it will bypass the approval process, however the email to Managers will still be sent requesting approval.
24.	Click the **Select ALL** link.
25.	Click the **Continue Enrollment** button. Continue Enrollment
26.	If there is a cost associated with an activity, you will see the **Enroll Learners - Payment Details** prior to submitting the enrollment. **You do not have to do anything here, as this system uses the IDB process.**

Step	Action
27.	Click the **Submit Enrollment** button. Submit Enrollment
28.	Notice the department is now enrolled in the activity: **ADA**.
29.	Also, notice the value in the **Available Seats** field has been updated.
30.	**Congratulations**! You should now be able to: - Navigate to the **Enroll Learners - Find Requesters** page. - Enroll a learner into an activity. **End of Procedure.**

6 Learning Admin Enrolling (Few) Learners into an Activity (Class)

Step	Action
1.	Begin by navigating to the **Enroll Learners - Find Requesters** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft
3.	Click the **Enterprise Learning** link. Enterprise Learning
4.	Click the **Enterprise Learning** link. Enterprise Learning
5.	Click the **Learner Tasks** link. Learner Tasks
6.	Click the **Enroll Learners** link. – Enroll Learners
7.	For this example, search for the person requesting enrollment by entering criteria in the **Requester's First Name** field.
8.	Click in the **Requester's First Name** field.
9.	Enter the desired information into the **Requester's First Name** field. Enter "**Malavika**".
10.	Click the **Search** button. Search
11.	Click the **Select** button. Select

Step	Action
12.	The **Enroll Learners - Search for Learning** page allows you to search for the requested activity or program by entering criteria in one or more of the search criteria fields.
13.	Click in the **Title** field.
14.	Enter the desired information into the **Title** field. Enter " **Cultural Awareness** ".
15.	Click the **Search** button. Search
16.	Select the correct dated class, click the **Enroll** button. Enroll
17.	You are now able to view details for the activity, **Cultural Awareness**, that is offered on 12/08/2009 prior to selecting the learner you want to enroll.
18.	Click the **Learner Lookup** button.
19.	Click the **Search by** drop-down list.
20.	Select the "**Last Name**" list item. Last Name
21.	Enter the desired information into the **begins with** field. Enter "**Kennedy**".
22.	Click the **Look Up** button. Look Up
23.	Click the "**Kennedy**" link. Kennedy
24.	Click the **Search** button. Search

Step	Action
25.	Click the **Select** option.
26.	The **Search for More Learners** link is used to select additional learners to enroll. For this example, Julie is the only learner you will be enrolling.
27.	Click the **Continue Enrollment** button. Continue Enrollment
28.	If there is a cost associated with an activity, use the **Enroll Learners - Payment Details** page to specify the payment details prior to submitting the enrollment. **(leave as is)**
29.	Click the **Submit Enrollment** button. Submit Enrollment
30.	Notice Julie Kennedy is now enrolled in the activity: **Cultural Awareness**.
31.	Also, notice the value in the **Available Seats** field has been updated.
32.	**Congratulations**! You should now be able to: - Navigate to the **Enroll Learners - Find Requesters** page. - Enroll a learner into an activity. **End of Procedure.**

7 Learning Admin Adding Supplemental Learning for a learner

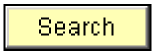
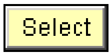
Step	Action
1.	Begin by navigating to the **Supplemental Learning - Enroll Learners** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft
3.	Click the **Enterprise Learning** link. Enterprise Learning
4.	Click the **Enterprise Learning** link. Enterprise Learning
5.	Click the **Learner Tasks** link. Learner Tasks
6.	Click the **Add Supplemental Learning** link.
7.	Click the **Learner Lookup** button.
8.	Click the **Search by** drop-down list.
9.	Select the "**Last Name**" list item. Last Name
10.	Enter the desired information into the **begins with** field. Enter "**Kodur**".
11.	Click the **Look Up** button. Look Up

Step	Action
12.	Click the "**Kodur**" link. Kodur
13.	Click the **Search** button. Search
14.	Click the **Add** button. Add
15.	The **Supplemental Learning** page is used to add additional learning to a persons planned learning that is not listed in the standard learning catalog.
16.	Click the **Type** drop-down list.
17.	Select the " **External Learning** " list item. **External Learning**
18.	**Note**: To enter education units for tracking purposes, the "**External Learning**" supplemental learning type must be selected from the drop-down list.
19.	Click the **Continue** button. Continue
20.	Enter the desired information into the **Title** field. Enter "**Retiring from the Government**".
21.	Click in the **Description** field.
22.	Enter the desired information into the **Description** field. Enter "**Description**".
23.	From the Status drop down choose "**External Learning**"
24.	Click the **Start Date** calendar button.
25.	Click the correct start date for the training.
26.	Click the **End Date** calendar button.

Step	Action
27.	Click the correct end date for the training.
28.	Click in the **Location** field.
29.	Enter the desired information into the Location field. Enter "Bismarck, ND".
30.	The Education Units field is used to enter the number of continuing education units that you want accredited to a learner on completion of this learning activity. Note: This value is for informational purposes only.
31.	Click in the Education Units field.
32.	Enter the desired information into the Education Units field. Enter "6".
33.	Click in the Provided By field.
34.	Enter the desired information into the Provided By field. Enter "The Learning Corporation".
35.	Click the Ed. Unit Type Lookup button.
36.	Select the "MEU" list item. (Select your correct learning unit) MEU
37.	You can enter in Estimated Travel/Hotel costs
38.	You can also enter in Estimated Meal costs
39.	Click the Save button. Save
40.	The supplemental learning has been successfully added for the learner.

8 Learning Admin Viewing All Learning

Step	Action
1.	Begin by navigating to the **All Learning - Find Learners** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft
3.	Click the **Enterprise Learning** link. Enterprise Learning
4.	Click the **Enterprise Learning** link. Enterprise Learning
5.	Click the **Learner Tasks** link. Learner Tasks
6.	Click the **View All Learning** link. – View All Learning
7.	Click in the **Learner** field.
8.	Enter the desired information into the **Learner** field. Enter "**Darin Schorsch**".
9.	Click the **Learner Lookup** button.
10.	Click the "**26206**" link. 26206

Step	Action
11.	Click the **Search** button. 
12.	Click the **Select** button. 
13.	The **Learner View** page allows you to view a learners entire learning history.
14.	Notice the different status' for each activity.
15.	**Congratulations**! You should now be able to: - Navigate to the **All Learning - Find Learners** page. - View a learners entire learning history. **End of Procedure.**

9 Reporting: Queries and Reports

So, you have assigned classes for folks as a learning admin and now you need to follow up on their progress. Here are some of the queries I use to verify completion.

Navigation: **Enterprise Learning>Reporting Tools>Query>Query Viewer** type in **NDS,** click **search**

<u>Tip:</u> if you click Favorite next to the query you use often, it will show up on the My Favorite Queries window and make it easier to find.

Menu

Search:

- My Favorites
- Self Service
- Manager Self Service
- Enterprise Learning
- Partners
- Catalog Management
- Set Up ELM
- Enterprise Components
- Worklist
- Application Diagnostics
- Tree Manager
- Reporting Tools
  - Query
    - Query Manager
    - Query Viewer
    - Schedule Query
  - PS/nVision
  - XML Publisher
  - Report Manager
- PeopleTools
- ND State Applications
- Back to Portal
- Change My Password
- My Personalizations
- My System Profile
- My Dictionary

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By: Query Name begins with NDS

Search Advanced Search

Search Results

*Folder View: -- All Folders --

Query — Customize | Find | View All | First 1-23 of 23 Last

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites
NDS_COURSE_ATTENDANCE_ACTIVITY	Prompt for Course & Activity	Public		HTML	Excel	Schedule	Favorite
NDS_COURSE_ATTENDANCE_ALL	Courses Completed by Course	Public		HTML	Excel	Schedule	Favorite
NDS_COURSE_ATTENDANCE_BY_BU	Courses Completed by BU	Public		HTML	Excel	Schedule	Favorite
NDS_COURSE_ATTENDANCE_BY_DATE	Courses Completed by Dt Range	Public		HTML	Excel	Schedule	Favorite
NDS_COURSE_ATTENDANCE_COURSE	Prompt for Course and Dates	Public		HTML	Excel	Schedule	Favorite
NDS_COURSE_ATTENDANCE_NAME	Courses Completed by Name	Public		HTML	Excel	Schedule	Favorite
NDS_COURSE_ATTEND_BU_COURSE	Courses Compl by BU and Course	Public		HTML	Excel	Schedule	Favorite
NDS_COURSE_COMPLETED_SUM	Courses Summary by Dt Range	Public		HTML	Excel	Schedule	Favorite
NDS_COURSE_COMPLETED_SUM_ACT	Prompt for Date Summary by Act	Public		HTML	Excel	Schedule	Favorite
NDS_COURSE_COMPLETED_SUM_BU	Count by Date and BU Prompt	Public		HTML	Excel	Schedule	Favorite
NDS_COURSE_ROSTER	Course Roster by Date	Public		HTML	Excel	Schedule	Favorite
NDS_COURSE_ROSTER_ALL_STATUS	Course Roster of all Status	Public		HTML	Excel	Schedule	Favorite
NDS_COURSE_WAITLIST	All Waitlisted Rosters	Public		HTML	Excel	Schedule	Favorite
NDS_LEGACY_BY_COURSE_NAME	Course Name Prompt % UPPERCASE%	Public		HTML	Excel	Schedule	Favorite
NDS_LEGACY_BY_EMPLOYEE	Emp. Prompt for Legacy Hist.	Public		HTML	Excel	Schedule	Favorite
NDS_LEGACY_BY_JOB_CODE	Job Code Prompt	Public		HTML	Excel	Schedule	Favorite
NDS_LM_PEND_APPR	Pending Approvals by LE	Public		HTML	Excel	Schedule	Favorite
NDS_LM_PERSON_ID_LOOKUP	Prompt by Learning Env, Deptid	Public		HTML	Excel	Schedule	Favorite
NDS_OMB_USER_ACCESS_DETAIL	User Details by date range.	Public		HTML	Excel	Schedule	Favorite
NDS_OMB_USER_ACCESS_SUMMARY	Number of users by date range.	Public		HTML	Excel	Schedule	Favorite
NDS_SELF_PACED_DETAIL	Status of Self-Paced Learning	Public		HTML	Excel	Schedule	Favorite
NDS_SUPP_EXT_LEARNING_EMP_DTL	Supp. Ext Lrn by Employee	Public		HTML	Excel	Schedule	Favorite
NDS_SUPP_EXT_LEARNING_ENV_DTL	Supp. Ext Lrn by Environment	Public		HTML	Excel	Schedule	Favorite

My Favorite Queries — Customize | Find | First 1-4 of 4 Last

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Remove
NDS_COURSE_ATTEND_BU_COURSE	Courses Compl by BU and Course	Public		HTML	Excel	Schedule	
NDS_LEGACY_BY_COURSE_NAME	Course Name Prompt % UPPERCASE%	Public		HTML	Excel	Schedule	
NDS_LM_PEND_APPR	Pending Approvals by LE	Public		HTML	Excel	Schedule	
NDS_SELF_PACED_DETAIL	Status of Self-Paced Learning	Public		HTML	Excel	Schedule	

Shows all courses and their status (enrolled, in progress, complete, cancelled, reserved) in a date range if you put in % in the course code it will pull all records for the business unit.

NDS_COURSE_ROSTER_ALL_STATUS - Course Roster of all Status

From Date: 01/01/2010

To Date: 04/01/2010

Course Code %: %

Business Unit: 11000

View Results

Download results in : Excel SpreadSheet CSV Text File (86 kb)

View All First 1-100 of 110 Last

	Course Code	Name	Activity	Start Date	End Date	Enrolled Date	Status	ID	Name	Unit	Department	Reserved Seat
1	110HRMS1000	ADA/FMLA Regulation Updates	1	01/06/2010	01/06/2010	01/07/2010	CANC	7000144	Sharp,Pamela K	11000	110110	1
2	110HRMS1000	ADA/FMLA Regulation Updates	1	01/06/2010	01/06/2010	01/11/2010	COMP	7000144	Sharp,Pamela K	11000	110110	1
3	110HRMS1000	ADA/FMLA Regulation Updates	11	03/18/2010	03/18/2010		RES	9999999	ZZ-Reserved	99999	999999	1

This query shows the training that a person took that was in the old system. (you must put the course information in this format: %ALLCAPS% if you don't have it in all caps when you search , you won't get any results.

NDS_LEGACY_BY_COURSE_NAME - Course Name Prompt %UPPERCASE%

Employee_Business_Unit: 11000

Course (e.g. %ADA%): %DEFENSIVE%

View Results

Download results in : Excel SpreadSheet CSV Text File (48 kb)

View All

	Unit	Name	Course Title	Start Date	End Date	Completion DT	Location	Study Hours	Travel Hours	Price	Continuing Education Units	Provide
1	11000	Ableidinger,Vicki R	DEFENSIVE DRIVING SMALL VEHICLES	12/14/2007	12/14/2007	12/14/2007	Risk Management	0.00	0.00	0.000	0.00	Risk Manager
2	11000	Block,Renell K.	DEFENSIVE DRIVING SMALL VEHICLES	02/05/2008	02/05/2008	02/05/2008	Risk Management	0.00	0.00	0.000	0.00	Risk Manager

This query allows you to see if you have any Managers that have not done there approvals for learners.

In the LE ID lookup, find your business unit.

NDS_LM_PEND_APPR - Pending Approvals by LE

LE ID: 1020

View Results

Download results in : Excel SpreadSheet CSV Text File (4 kb)

View All

	Confirmation	Cat Item ID	Name	ID	Learner ID	Name	Customer	Long Name	Activity Requir	Type	Status	Status	Waitlist Number	Approval ID	Approved On	Status Change D	Requestor	Currency	Payment Method	Initiated	Initiated Date	Enrolled Date
1	111720	1025	Workplace Violence - We're Not in Mayberry Any More, Barney.	1060	52372	Westermann,Diane M	1383	127 Tax Dept.	Y	STDD	PEAP	PEAP	0	0		03/31/2010	33657	USD	CHGB	N		03/31/2010
2	111721	1025	Workplace Violence - We're Not in Mayberry Any More, Barney.	1060	52095	Filipek,Amanda J	1383	127 Tax Dept.	Y	STDD	PEAP	PEAP	0	0		03/31/2010	33657	USD	CHGB	N		03/31/2010

This query shows you the status of web based training, see how folks are doing on their RISK courses with this one.

NDS_SELF_PACED_DETAIL - Status of Self-Paced Learning

LE ID: 1012

From Date: 03/01/2010

To Date: 04/01/2010

Course Code (e.a. 110%): %

View Results

Download results in : Excel SpreadSheet CSV Text File (25 kb)

View All First 1-33 of 33 Last

	Course Code	Name	Activity	Enrolled Date	Status	ID	Name	Unit	Department
1	110RISK0005	Risk Management Incident Reporting	206	03/29/2010	Enrolled	0249011	Breuer,Stacey M	11000	110113
2	110RISK0005	Risk Management Incident Reporting	206	03/29/2010	Enrolled	0288158	Jensen,Linda M.	11000	110113
3	110RISK0005	Risk Management Incident Reporting	206	03/29/2010	Enrolled	0168607	Lundberg,Lee W	11000	110113